

Life Insurance Review Telephone Script

Hi _____, this is _____ from
_____.

I'm just calling to let you know that we're giving each of our customers an opportunity to do a free life insurance review. I know what you're thinking, they just want to sell me "more" life insurance. This is not designed to sell you "more" life insurance, but it will give you an understandable summary of what you do have, and may even save you some money. The reason we're doing this is that with interest rates being so low for so long, and insurance rates changing so much, a lot of people are finding that their policies aren't doing what they expected them to be doing, and many of our clients tell us that they haven't reviewed their policies in years because every time their agent said he was coming out to review their policy, he just tried to sell them more insurance. (Leave this highlighted section out if they are your life insurance client!)

When would be a good time to stop over for us to get your life insurance policy information?